



# WEBINAR SERIES

# Roadmap to EMS

## Data Hygiene

Presented by:  
Association Technology Solutions





# About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- iMIS Bridge powered by ATS with over 140 integrations
- Over 100 RiSE website implementations
- iMIS EMS upgrade specialists supporting dozens of iMIS EMS clients





*Presenter:*

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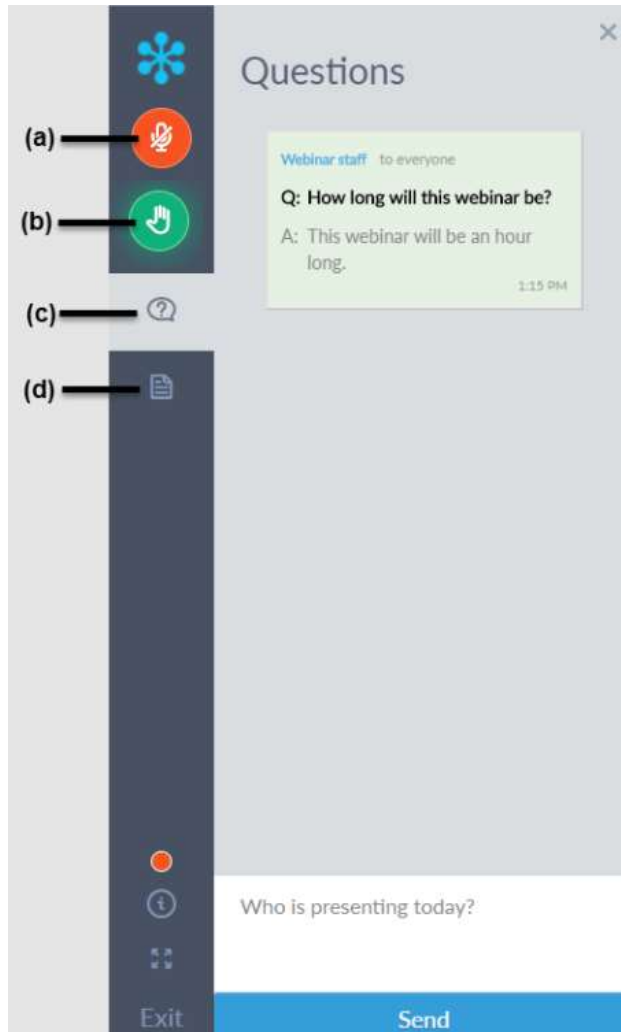
*Moderator:*

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- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts  
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete



## Direct Upgrade

- ASI Hosting Azure
- Automatic Updates
- Security, Disaster Recovery, & PCI Validation

## 20/20 Advance Program

- ASI Hosting Azure
- **Periodic Updates**
- Security, Disaster Recovery, & PCI Validation

## Self-Hosted

- Client Preference
- Client Responsible for Updates and Support
- **Access to SQL**

Have AiSP run the  
ASI customization  
scripts

**HELP!**

Remove all  
customizations!!!



There's More



# Current Data





- How Clean is your Data?
  - My organization hasn't cleaned data in years
  - My organization schedules annual data reviews
  - My organization has daily checks
  - Clean data, what's that?



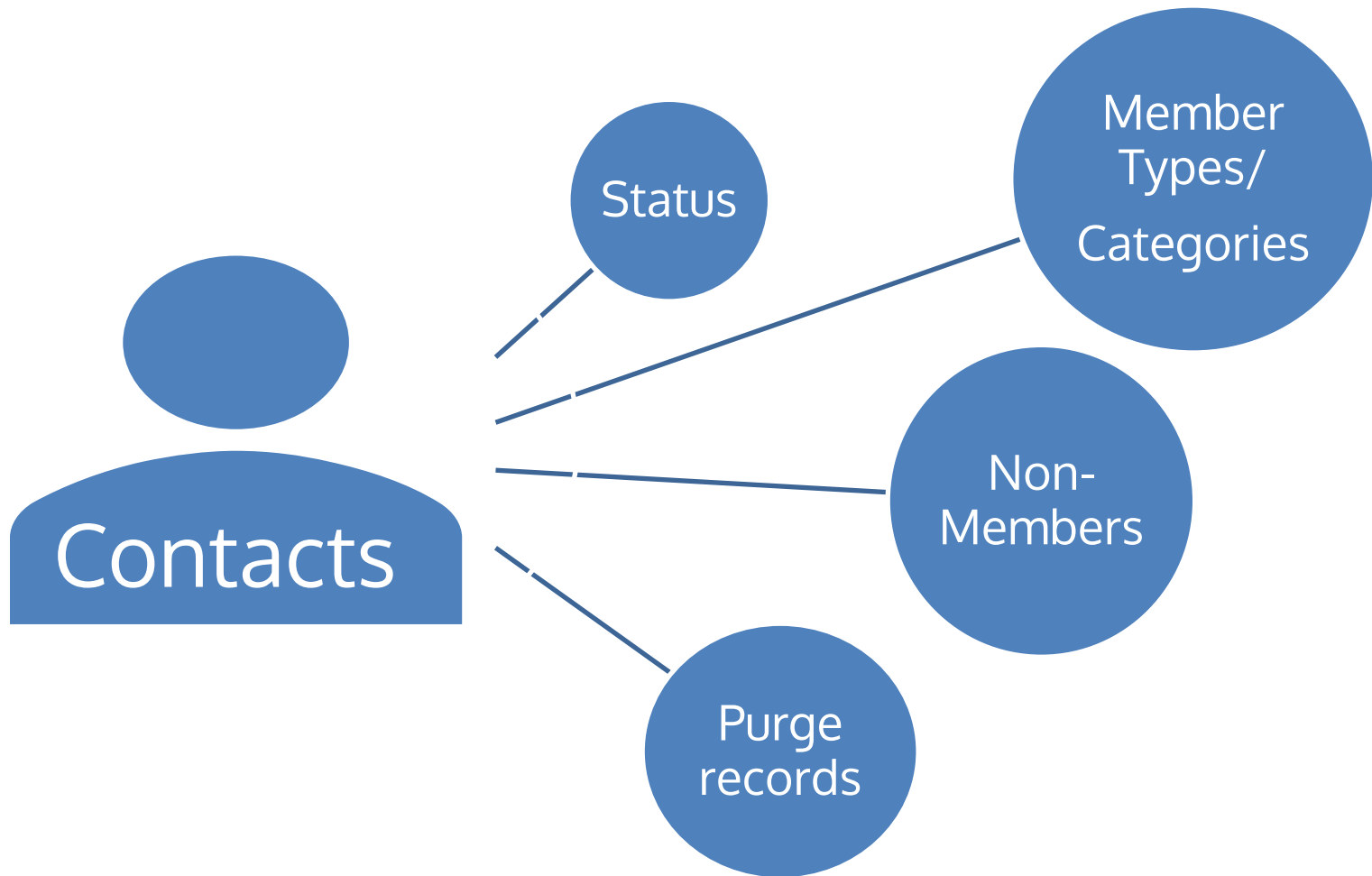
Clean data makes for an easier migration to EMS

SQL Tools are available to clean data in iMIS 2017, not in EMS

Some things don't work in EMS unless specific fields are populated

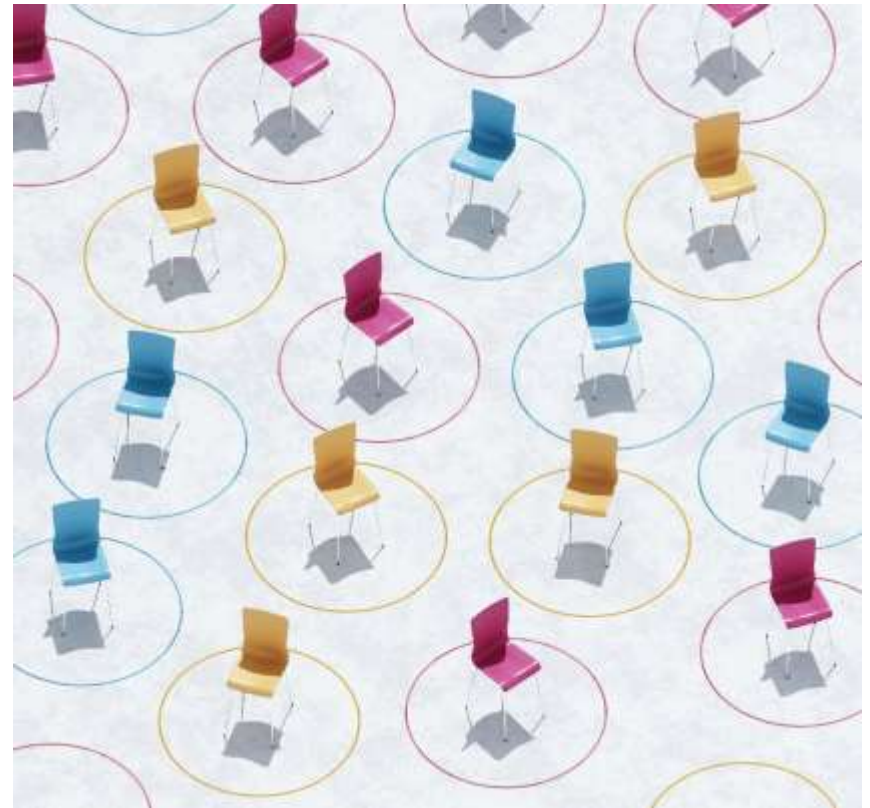


# Where to Start?



## Demographic and Custom Fields

- Is the data current?
- Is the data accurate?
- Will the data be needed in the future?
- Can data be moved to a standard field in iMIS?
- How will the data be updated in EMS?



Products

Update the Web Option for products

Events

Update the Show on Web option for events

RiSE

Update custom system icons

Contacts

Ensure M and NM customer types exist

- Post open batches
- Publish all working content and business objects
- Delete expansion values for general lookup tables.
  - Exceptions (DESIGNATION, PREFIX, SUFFIX, and FUNC\_TITLE tables)
- Designate all inventory to the default warehouse before upgrading
- Remove additional publishing servers



# ATS Best Practices

- Review Address Records
- Confirm Member\_Record and Company record are populated correctly
- Check required fields for all Members
- Clean Subscriptions table

**Warning:** Updating data thru SQL can break internal Processes (both ASI's and your organization's custom work).





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Backup database  
prior to running  
updates

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Make sure change  
log (name\_log)  
records changes





Budget time in your migration plan to address data cleanup



Plan how data is going to be kept current in EMS



Remember accurate data leads to a smoother migration

There is no stasis in  
data management -  
Wes Trochlil





# Questions & Answers



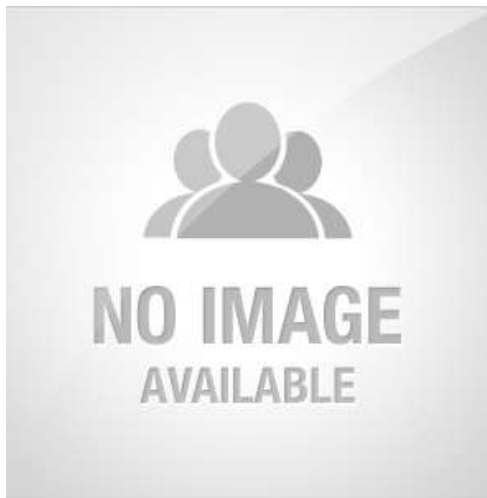
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Looking for more from the experts at ATS?

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*video recordings and  
downloadable presentation slides*

## ATS Learning Center

[atsol.org/ATSLearningCenter](https://atsol.org/ATSLearningCenter)

## Other Questions

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